

Job Aid:

Create a Quote in COMMBUYS

This Job Aid shows how to:

- Create a Quote in COMMBUYS

Of Special Note:

This job aid will walk a seller through the process of creating a quote in response to a bid in COMMBUYS. It is the Seller's responsibility to read the bid and any attachments in its entirety prior to creating a quote. OSD recommends you create a bid specific folder that is easily accessible with any completed documents or forms that must accompany the quote. Be sure to follow any file upload instructions that may be indicated by the buyer in the language of the RFR (request for response) i.e. naming convention, file description, file size or other instructions. Upon award there may be additional forms/signatures required to execute the contract.

Screenshot



Directions

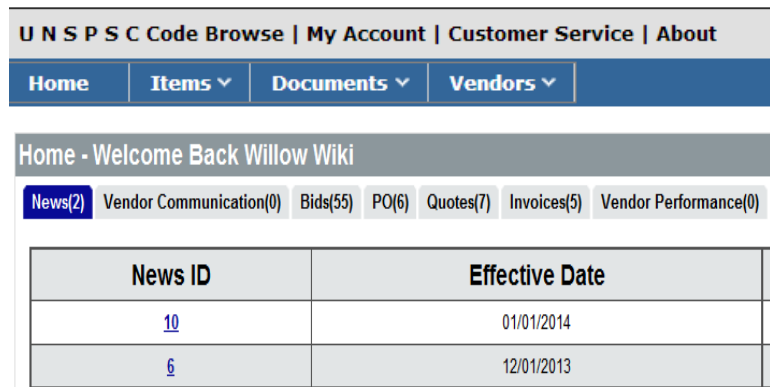
1. Launch the COMMBUYS Web site by entering the URL <https://www.commbuys.com/bsa/> in the Browser.

Enter your login credentials and click the **Login** button on the COMMBUYS home page.

2. Upon successful login, your home page displays with the **Navigation** and **Header** bar as well as your **Control Center**.

The **Control Center** is where documents assigned to you are located.

Click on the **Bids** tab to view open and closed COMMBUYS Bids.



News ID	Effective Date
10	01/01/2014
6	12/01/2013

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Screenshot

News(2) Vendor Communication(1) **Bids(60)** PO(1) Quotes(5) Invoices(0) Vendor Performance(0)

Request for Revision

No records found.

Bids / Bid Amendments (Un-Acknowledged)

Bid #	Organization	Alternate Id	Buyer	Description
00000014	Operational Services Division		Eric Jacobsen 2	Substance Abuse Recovery Residential Servi
00000025	Operational Services Division		Eileen Honen	Pet sitting services
00000035	Operational Services Division		Melissa Morrison	Purchase from MB
00000120	Operational Services Division		Chris Kennedy	Substance Abuse Counseling

Open Bids

Bid #	Organization	Alternate Id	Buyer	Description
00000144	Operational Services Division		Buyer Buyer	Snow Man Party
00000121	Operational Services Division		Eric Jacobsen 2	please do not modify - multi-vendor multi-item bid
00000114	Operational Services Division		Linda Banks-Grant	test approval

Closed Bids

Bid #	Organization	Buyer	Description
00000142	Operational Services Division	Alyssa Arnold	demand
00000144	Operational Services Division	Alyssa Arnold	Quick Buy Description

Directions

3. Clicking on the Bid tab opens four sections:

- **Request for Revision:** bid revision tab is used to ask a vendor for a quote revision or a best and final offer
- **Bids / Bid Amendments (Un-acknowledged):** sent to the Vendor, require acknowledgment and review
- **Open Bids:** open for response from all Vendors
- **Closed Bids:** no longer available to submit quotes

Click on a **Bid #** (blue hyperlink) to open and review a bid, either in the Bids / Bid Amendments or Open Bids section.

4. A new page opens with a message requesting you acknowledge receipt of the Bid. Click **Yes** to acknowledge receipt.

In this acknowledgement you agree to the following:

- Receive future correspondence to this solicitation via email
- Agree to maintain your vendor profile for accuracy and current contact information
- Agree to adhere to COMMBUYS requirements
- Agree that the quote MUST be submitted prior to the due date
- Agree that an online quote responses in not considered submitted until you are in receipt of a confirmation email stating your response has been received
- Agree that a quote submitted electronically that remains "in progress" status at the time of Bid opening will not be accepted (including quotes in the process of uploading attachments)

If you select NO you may still view the bid but will not receive any notifications regarding updates or amendments.

Acknowledge Receipt and View Solicitation

Bid # 00000195
 Bid Description pw 6/13/14 life preservers

Acknowledge Receipt and View Solicitation Click Yes to acknowledge that, by downloading this bid, you: 1. Agree to receive all future correspondence regarding this solicitation via email. 2. Agree to maintain your vendor profile to ensure accuracy and current email contact information (vendor email field/organization administration tab). 3. Agree to adhere to all COMMBUYS requirements (attachments, terms/conditions, etc.) when responding to a Bid. 4. Agree that a Quote MUST be submitted prior to the due date and time stated in COMMBUYS (referred to as the "Bid Opening Date/Time" in COMMBUYS). 5. For Quotes submitted electronically through COMMBUYS, agree that a Quote (i.e., a response to a bid) is not considered submitted, unless you are in receipt of a confirmation email stating that the Quote has been received. (To submit a Quote, click on the Submit button on the Summary Tab). 6. For Quotes submitted electronically through COMMBUYS, agree that a Quote that remains in an "in progress" status at the time of the Bid Opening Date/Time will not be accepted; including Quotes in the process of uploading attachments. Click Proceed if you agree with the above and if you wish to continue.

Yes

No



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5. The Bid opens and displays a summary of details.

Information displayed includes:

- **Bid Number:** COMMBUYS generated
- **Description:** could hold different information based on buyer (possible examples are agency's bid number, short description of the Bid, key words)
- **Bid Opening Date:** date bid is opened for evaluation and closes to quote submission by vendors
- **Purchaser:** contact/creator of the Bid
- **Organization, Department, Location:** agency information
- **Type Code:** either **SW** (statewide) or **NS** (non-statewide, department bid)
- **Allow Electronic Quote:** should always be Yes
- **Required Date:** agency's request (follow up with Bid contact)
- **Available Date:** date Bid was posted/sent
- **Info Contract:** contact for this bid
- **Bid type:**
 - **Open:** any vendor can respond
 - **Closed:** only selected vendors can respond
- **Informal Bid Flag:**
 - **Yes:** indicates buyer can see quotes before Bid Opening date
 - **No:** indicates formal bid and buyer must wait until Bid Opening date to review quotes
- **Purchase Method**
 - **Market:** one time bid
 - **Blanket:** contract
- **Pre-Bid Conference details**
- **Ship-to and Bill-to Addresses**
- **File Attachments:** attachments to the Bid (Be sure to read all attachments and read, complete and/or submit as instructed)
- **Item Information:** item description, UNSPSC code (chosen by the buyer), quantity, unit cost, UOM (unit of measure), and any other criteria entered by the buyer

Bid Solicitation: 00000213

Header Information

Bid Number: 00000213	Description: OSD - TQM	Bid Opening Date: 03/31/2014 12:43:00 PM
Purchaser: Rochelle Waterman	Organization: Organization XYZ	
Department: XYZ01 - Department01	Location: PUR01 - Bos Purchasing	
Fiscal Year: 14	Type Code:	Allow Electronic Quote: Yes
Alternate Id:	Required Date:	Available Date : 03/17/2014 12:43:00 PM
Info Contact:	Bid Type: OPEN	Informal Bid Flag: No
Purchase Method: Open Market		

Pre Bid Conference:

Bulletin Desc:

Ship-to Address:	Kimberly McPhail 1 Congress Street Boston, MA 02115 US Email: kimberly.mcphail@massmail.state.ma.us Phone: (666)666-6666	Bill-to Address:	Kimberly McPhail 1 Congress Street Boston, MA 02115 US Email: kimberly.mcphail@massmail.state.ma.us Phone: (666)666-6666
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File Attachments: [Commonwealth Terms and Conditions](#) [Pest Control RFB](#) [Business Reference Form](#)

Form Attachments:

Question #	Print Sequence	Required	Question	Response
1	1.0	Yes	Does your company have at least 3 years experience?	
2	2.0	No	Does your company offer alternative EPP products?	

Item Information

Item # 2: (10-19-17-01-0000) 10-19-17-01-0000 - Animal control traps

UNSPSC Code: 10-19-17-01-0000

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
8.0		EA - Each				
Manufacturer:			Brand:		Model:	
Make:			Packaging:			

Print Page

Create Quote

Bid Q & A

Exit



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Item Information			
Item # 1: (10-10 - 15) Electron Microscope			
U N S P S C Code: 10-10 - 15			
Qty	Unit Cost	UOM	Total Discount Amt.
5.0		EA - Each	
Manufacturer:		Brand:	
Make:		Packaging:	
Item # 2: (10-10 - 15) brilliant white copy paper			
U N S P S C Code: 10-10 - 15			
Qty	Unit Cost	UOM	Total Discount Amt.
10.0		CS - Case	
Manufacturer:		Brand:	
Make:		Packaging:	

[Print Page](#) [Create Quote](#)

Directions

7. The lower half of the page provides information about the goods or services the bid is requesting.

If the buyer enables the bid to allow for Bid Questions/Answers, upon selecting the Bid Q&A at bottom of screen you will be able to post your question.

Read the language of the RFR for any special instructions/restrictions for the Bid Q&A.

Click **Create Quote** to begin.

8. The **General** tab for a new quote opens. This page is populated with some information from the bid. Fields available (optional) to update include:

- **Description:** information from the Bid, can be edited
- **Delivery Days**
- **Discount Percent**
- **Is 'No' Bid** – select if you will not be submitting a quote for this bid.
- **Alternate Bid** - if this is the second quote for the vendor (if allowed)
- **Shipping Terms** – use dropdown
- **Freight Terms** – use dropdown
- **Ship Via Terms** – use dropdown
- **Payment Terms** – use dropdown
- **Promised Date** – use calendar icon to select date
- **Info Contact** – 400 character field
- **Comments** – 400 character field

Update information as needed. Click **Save & Continue** to save the changes create the Quote Number.

9. The page refreshes and messages display. Red messages are errors and must be resolved before quote submission. Yellow messages are warnings and processing may continue.

The following messages are received:

- **Terms & Conditions is not acknowledged** – to resolve this, click on the **Terms & Conditions** tab and accept the terms.
- **Your quote has not been submitted** – information message; no action required

New Quote	
General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary Back to Bid	
Quote #:	Bid #: 00000144
Organization: Operational Services Division	Description*: Snow Man Party
Status: In progress	Discount Percent: 0.0 %
Delivery Days: 0	Alternate Bid: <input type="checkbox"/>
Is "No Bid": <input type="checkbox"/>	Freight Terms: Freight Allowed
Shipping Terms: Cost and Freight	Payment Terms: 10% Net 10
Ship Via Terms: Best Way	
Promised Date: (MM/DD/YYYY)	
Info Contact:	
Comments:	
Date Last Updated:	User Last Updated:
Save & Continue	

Quote Validation Errors

- **Terms & Conditions is not acknowledged.**

Quote Validation Warnings

- **Your quote has not been submitted.**



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Screenshot

UNSPSC Code Browse | My Account | Customer Service | About March 17, 2014 1:05:13 PM EDT Richelle Waters

Home POs Bids Contracts Quotes

General Item Information Validation Errors

- Terms & Conditions is not acknowledged.
- Question #1 for header is mandatory and not answered.

General Item Information Validation Warnings

- Your quote has not been submitted.

Quote 0000472 - Buckley Test Vendor 8

General **Items** Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

General Notes

Sort by Column: Print Sequence ☐ Sort Descending

Item #	Print Sequence	Questions Exist	Description									
			Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	
2	2.0	No	(10-19-17-01-0000) 10-19-17-01-0000 : Animal control traps									
			8.0	EA	25.99	0.00		0.00	\$207.92	<input type="checkbox"/>	<input type="checkbox"/>	
Alternate Description:			EFF products available for an									
Quote Response Total							\$207.92					

Directions

10. Click the **Items** tab. The **Items** tab displays showing information about the requested items.

To view additional details about an item, click the **item #** number (blue hyperlink) to open.

Quote 0000145 - Pets R Us

General **Items** Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back](#)

General Notes

Item #: 1 Date Last Updated: 01/14/2014 10:23:29 PM
Item Description: Electron Microscope

Quantity	UOM	Unit Cost	Discount %
5.0	EA	350.00	0.0

[Back to Bid](#)

User Last Updated: Devon McCall

Freight	Extended Amount	No Bid	No Charge
8.50	\$1758.50	<input type="checkbox"/>	<input type="checkbox"/>

11. The item opens. Input your quote information for the items / services (unit cost, discount %, freight) and click **Save & Exit**.

The No Bid check box will default:
REMEMBER to enter a unit cost or check **No Charge** if no dollar amount is required for the quote.

- A No Bid is considered a nonresponse.

Once all information has been completed on the Items tab, click the **Terms & Conditions** tab.

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Screenshot

UNSPSC Code Browse | My Account | Customer Service | About

Home | POs | Bids | Contracts | Quotes

Quote Validation Errors

- Terms & Conditions is not acknowledged.

Quote Validation Warnings

- Your quote has not been submitted.

Quote 00000472 - Buckley Test Vendor 8

General | Items | Questions | Subcontractors | Notes | **Terms & Conditions** | Attachments | Summary | [Back to Bid](#)

The following list constitutes all the attachments for the bid which may include supplemental terms and conditions.

File Name	Description	File Size
Commonwealth Terms and Conditions (1)	MASS Terms and conditions	0 bytes
Pest Control RFR (Pest Control RFR)	Specifications and requirements for bid submission	595,284 bytes
Business Reference Form (Business Reference Form)	Provide at least 3 recent (12 months) customers contact information	845,941 bytes

Do you accept the terms & conditions of the bid?

☒ Yes ☐ Yes with exceptions ☐ No

If you do not fully accept the terms & conditions, please note the exceptions below:

[Save & Continue](#)

Directions

12. The **Terms & Conditions** page opens. Click **Yes** to accept the terms and conditions. Then click **Save & Continue**.

Next click on the **Attachments Tab**.

Quote 00000474 - TOM's Training Nineteen

General | Items | Questions | Subcontractors | Notes | Terms & Conditions | **Attachments** | Summary | [Back to Bid](#)

Files

[Click Add File to add file attachments.](#)

No File Attachments

Forms

[Click Add Form to add form attachments.](#)

No Form Attachments

[Add File](#) [Add Form](#)

13. The **Attachments Tab** allows you to upload files (files may be documents related to the bid that you have completed and need to attach to your response) and forms.

- Examples may be: bidder's response sheet, W9s, Electronic Funds Transfer form, Supplier Diversity Plan Form and others.

Note: Add Forms is currently not a working function in COMMBUYS.

Add File

Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain characters, spaces, and special characters up to a maximum length of 200.

Name*:

Description:

File*: [Browse...](#)

Location: 00000051

Confidential: ☐

Choose File to Upload

Organize | New folder

File name: All Files (*.*)

[Open](#) [Cancel](#)

14. There are a couple steps to follow for adding a file:

- Select the **Browse** button to locate the file you wish to upload and click **Open** once the correct file is found.
- Name** is the display name for the file that will appear when posted. It can be different from its saved location name and can contain alphanumeric characters, spaces and special characters up to a maximum length of 200.
- The **Description** field allows you to briefly describe the file.

Select **Save and Exit** to proceed and return to the **Attachments Tab**.

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Screenshot

Quote 00000474 - TOM's Training Nineteen

General Items Questions Subcontractors Notes Terms & Conditions **Attachments(1)** Summary [Back to Bid](#)

Files

Name	Description	Confidential	Attached By	Attached Date	Delete
TOMVendor - SDP Plan Form	Completed SDP Plan Form	<input type="checkbox"/>	John Smith	06/20/2014	<input type="checkbox"/>

Forms

i Click Add Form to add form attachments.

No Form Attachments

[Save & Continue](#) [Add File](#) [Add Form](#)

Directions

15. Each document must be 'added' one at a time. Once you have uploaded all your files and forms and click **Save & Continue**.

You can view the list to ensure that all your intended document as displaying. If you select the hyperlink, you will be able to open the document.

If you want to remove a document from the list, select the **Delete box** and click **Save & Continue**.

Select the **Summary Tab** to review and submit quote.

Quote 00000145 - Pets R Us

General Items Questions Subcontractors Notes Terms & Conditions Attachments **Summary** [Back to Bid](#)

Header Information

Quote #:	00000145	Bid #:	00000144	Status:	In progress
Organization:	Operational Services Division				
Description:	Snow Man Party	Delivery Days:	0	Discount Percent:	0.0
Bid Flag:		Alternate Bid:	No	Shipping Terms:	Cost and Freight
Freight Terms:	Freight Allowed	Ship Via Terms:	Best Way	Payment Term:	10% Net 10
Promised Date		Info Contact:		Quote Total	\$2,050.50
Comment:					
Date Last Updated:	01/14/2014 10:29:39 PM	User last Updated:	Devon McCall		

Vendor accepts the terms & conditions with no exceptions.

[Print](#) [Submit Quote](#) [Cancel Quote](#)

16. The Summary tab displays. Review the bid, update if needed. Otherwise, click the **Submit Quote** button at the bottom of the page.

Message from webpage

? Are you sure you want to submit this quote?

[OK](#) [Cancel](#)

17. Popup window will display asking for verification on quote submission.

Click **OK** to submit the quote.



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Screenshot

UNSPSC Code Browse | My Account | Customer Service | About

March 17, 2014 1:12:57 PM EDT

Home | PDs | Bids | Contracts | Quotes | Richelle Waterman

Quote 00000472 - Buckley Test Vendor 8

General | Items | Questions | Subcontractors | Notes | Terms & Conditions | Attachments(2) | **Summary** | Back to Bid

Header Information

Quote #:	00000472	Bid #:	00000213	Status:	Submitted
Organization:	Organization X/YZ				
Description:	OSD - TOM Response	Delivery Days:	0	Discount Percent:	0.0
Bid Flag:		Alternate Bid:	No	Shipping Terms:	
Freight Terms:		Ship Via Terms:		Payment Terms:	
Promised Date		Info Contact:		Quote Total	\$0.00

Comment: For alternative EPP products, please allow 24 hours for delivery.

Date Last Updated: 03/17/2014 01:12:51 PM User last Updated: Richelle Waterman

Vendor accepts the terms & conditions with no exceptions.

Questions:

Question #	Required	Question	Response
1	Yes	Does your company have at least 3 years experience?	Yes
2	No	Does your company offer alternative EPP products?	Yes

Attachments

Agency Files:

Agency Forms:

Vendor Files: [Business Reference Form](#), [Terms and Conditions](#)

Vendor Forms:

Item Information

Print Sequence # 2.0 : (10-19-17-01-0000) 10-19-17-01-0000 : Animal control traps

Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
8.0	EA	\$0.00	0.0%	0.0%	\$0.00	\$0.00	Yes	No

Print Withdraw Quote

Directions

18. Summary tab redisplay with an updated status for the quote of Submitted.

From the summary tab of a bid, you can Withdraw Quote anytime up until it has been viewed by the Buyer or the Opening Bid Deadline date has NOT passed.

This Job Aid is also available as a presentation on [OSD's YouTube Channel](#)